

Avanade Production Tool Management User Guide

Dynamics 365 for Operations



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1 Overview Resource Management /Overview tool administration

1.1 Introduction

The Avanade resource management/Tool administration asset is intended for a tool-intensive industry such as plastic injection molding and metal die casting. The use of master data module is conceivable in any industrial operation, where test equipment, tools, fixtures or equipment are used. With 'Tool administration' module, simple and complex tools can be managed, the tools can be assigned to a product and can use a certificate provided.

It manages various information in the master data:

- General information
- Procurement information
- Technical information
- Usage control data
- Documents and attachments

The structuring takes place on a model structure, which is represented in a hierarchical form in the system. The performance data are represented in a compact on the steps to the top.

The parts produced by using the equipment (products) can be compared with the planned values and monitored in the form of a usage assessment. The respective amounts are automatically stored in the ready message of the production orders or operations in the resource management.

You can each decide whether to feedback due to the produced parts or as time feedback at specific intervals respectively after the end of a process step carried out. For external production values through purchasing (delivery) will be registered. If the tool is used at a customer's usage message is sent via the delivery.

The Avanade resource management is divided into three modules:

- Master Data Module
- Usage assessment
- Activity management

The master data module is a prerequisite for the other modules.

Furthermore, this module allows usage control with the number of parts produced can be monitored over a plan value. With type management activities, can as repair or maintenance are allocated and monitored a tool. The activities are in production planning (Module: Master planning) queried and correspondingly result in a warning. You can enjoy the activities automatically trigger on events (Cyclically amount or time, only quantity Depending intervals).

Production planning of Dynamics 365 for operations considers the "activities" of the equipment, such as repairs or maintenance projects (Hard, planning is discontinued or soft, planning continues).

- Timed for example from 01.07. until 10:07.
- Flow-dependent, for example, revision by 50,000
- Frequency, for example, always after 5 productions

The resource management is integrated into the Dynamics 365 for operations quality assurance. This includes:

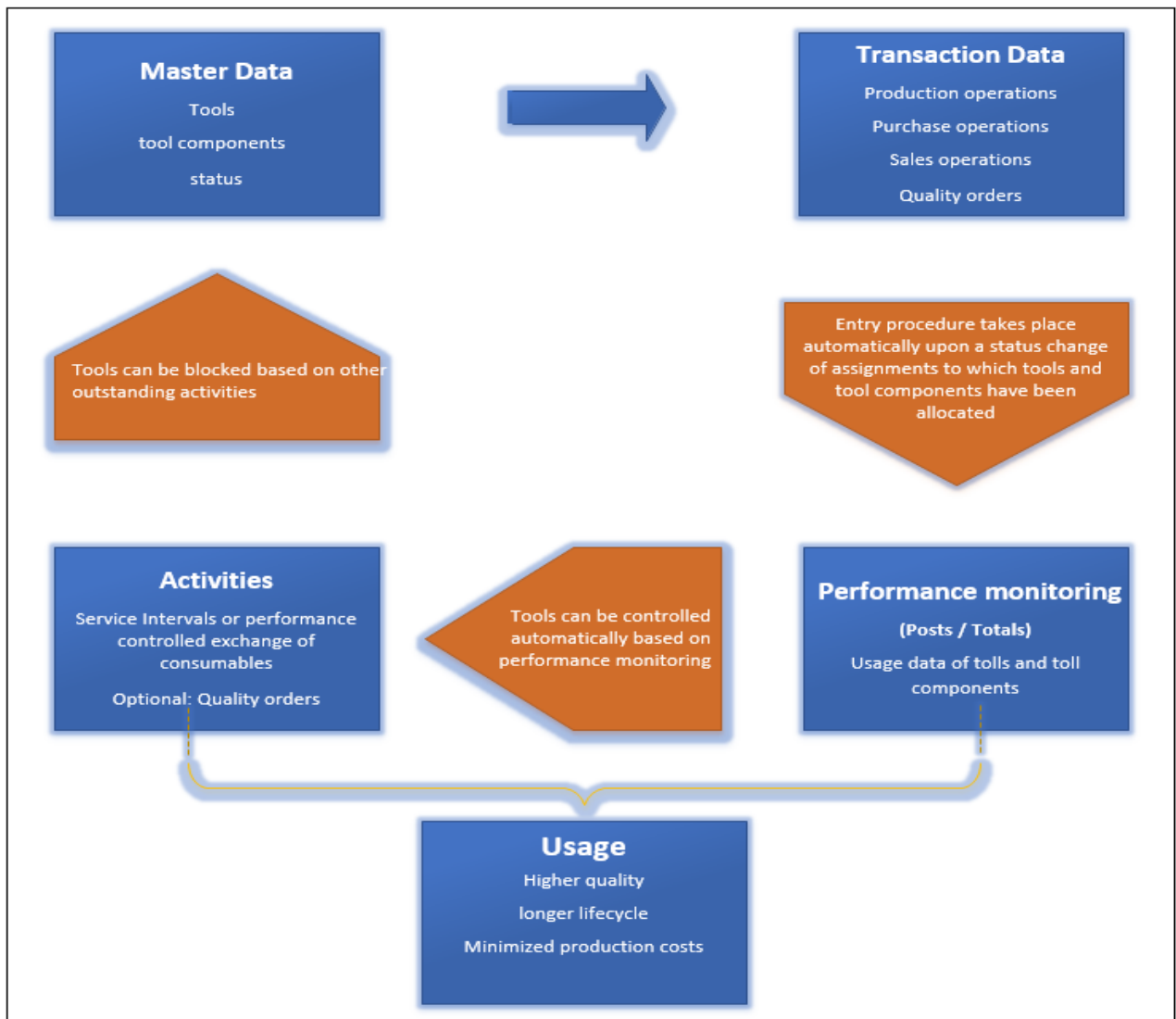
1. Use of quality inspection orders for equipment Activities
2. Use of resources in quality inspection orders as test equipment
3. Create resources as a test instrument

All three integration points are optional and can be used independently.

Likewise, the resource is in the following DYNAMICS 365 modules integrated (all optional)

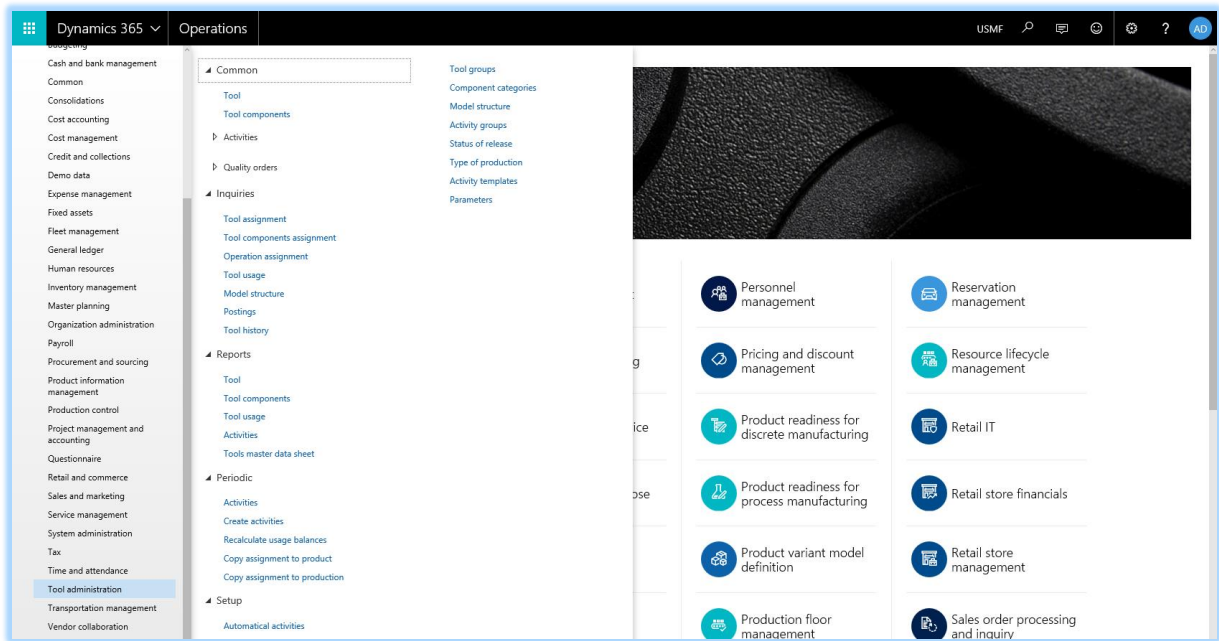
- Create resources as Article
- Create resources as a resource
- link resources with the banking book
- Resources are used for a vendor
- Resource are used for a customer
- Resources are linked to a project (Invest and maintenance)
- Activity triggers a purchase requisition

1.2 Composition structure



1.3 Entry into the module resource management

You will find the module resource management / Tool administration either by selecting the basic menu or via the navigation area. Here are all the transactions of the implementation of resource management. The navigation, handling and operation here is no different to the Microsoft standard modules.



1.4 Security, roles and permissions /Security, role and privileges

The Avanade Resource management module is fully integrated in the role-based authorization concept of Microsoft Dynamics 365 for operations. All calls, transactions, reports and queries of the module resource management are included in the task-based standard roles of Microsoft Dynamics 365 for operations.

Typically, these settings are managed by an administrator.

Function Description

2 Establishment and management of resource management

The Master Data module allows management of tools such as jigs, gauges, equipment, measuring equipment, etc., or the management of multi-part complex tools which, inter alia as a plastic injection molding or metal die casting.

The simple tools can be managed as a resource with a tool strain without additional structures. In tool master general information, information about the procurement, technical information, and the information can be saved to usage control.

To model complex tools, equipment positions can be created and assigned to the resources.

To the superordinate structuring of various resources is the model structure. It can be detected models and brought into a hierarchy. Each of these models can be one or more assigned resources. The usage of the resources within a model structure are compressed on the steps to the top and can be viewed cumulatively.

2.1 Resources /tool

➤ Call: / Tool Administration> Common> Tool

In the field group "criteria" filter criteria are defined. After the flag "locks" put resources are for each criterion only appears to meet the criteria.

2.1.1 Information about register

The registers can be customized via Personalization. Therefore, the following list is only a standard listing. Each of these fields is also included in the complete register.

Tool Number	Name	Mold set	Tool group	Positions active	Usage active	Activities active	Internal release status	Release status external	Last usage
4000-VD	Tool using by Vendor		TG1	✓	✓		Released	Released	
4000-VD-01	Tool for Item 4000-VD (Size 10 ...		TG1	✓	✓		Released	Released	2/15/2017
4000-VD-02	Tool for Item 4000-VD (Size 20 ...		TG1	✓	✓		Released	Released	
5000	Gauge blocks (0.5 to 100mm)		ME		✓	✓	Released	Released	
T001	Test Tool 1		TG1	✓	✓	✓	Released	Released	2/23/2017
T002	Test Tool 2		TG2	✓	✓	✓	Released	Released	
T003	Test Tool 3		TG3	✓			Released	Released	
T004	Test Tool 4		TG1	✓			Released	Released	
T005	Test Tool 5		TG1	✓	✓	✓	Released	Released	
T006	Test Tool 6		TG1	✓		✓	Released	Released	

Information register Overview	Description
Activity due / Activities due	Indicates if an activity is due. The parameters, the behavior of the system are defined when due or overdue activities (eg screen message).
Resource number / tool Number	Unique number of resources
Set Tools / Mold set	Indicates that a combination of disparate products from this tool results.
Designation / Surname	Identification of resources
Resource group / tool Group	Resource groups are used to group, filter and sort of screen displays and printouts.
Positions active / position active	Flag is active - resource positions to resources available
Performance active / Usage active	Flag is active - determines the usage of the equipment and logs.
Activities active / activities active	Flag is active - there are activities the resources allocated (Button activities is active).
Items / Items	Flag is active - the resource is created as products
resources / Ressouce	Flag is active - the resource has been created as a resource
Resource Group / Ressoucegroup	Flag is active - the resource is created as a resource group
Test instrument / test instrument	Flag is active - the resource is created as a test instrument.
Internal Release Status / internal release status	
External release status / external release status	
Final use / Last usage	Date of last use of the equipment.
Resources in external use / Tool is used external	You see at a glance immediately whether the resource is in a customer or supplier in use.
Account number / Customer account	This shows in which customers the resource is currently.

Register Detail - Tool

Information Register General / general	description
Resource number / tool number	The equipment number can be assigned manually or is embarrassed by a number range. Double counting is not possible here.
Positions active / position active	If the indicator is set, and resource positions can be detected to resources.
Designation / Surname Designation 2 / name 2	The label fields are free writable.
Serial number / Serial number	(only information) The serial number of the equipment can be added (only information - no checks on this field).
Resource group / tool group	Used for grouping and evaluation of resources.
Model structure / Model structure	Unique number identifying the associated model structure (see section Complex tooling)
Competent person / Person in charge	Assignment of an employee from the employee master
Location / Site	The resources can be assigned to a location (standard dimension).
Warehouse / Warehouse	Allocation of the storage location in which the equipment is mounted (standard dimension).
Storage space - 1 / Location 1 Storage space - 2 / Location 2	Information of the exact storage location (User definable) Information of the exact storage location (User definable)
Total weight / Overall weight	Weight is indicated by the resource
Unit / Unit	The unit in which the resource is defined and stored.
Gross Depth / Great depth Gross width / Gross width Gross height / Gross height Unit / Unit	Specifying the resource-mass (incl. Unit size tolerances)

Activities active / activites active	If Yes - Activities will be used for this resource
Planned hours / Schedule time	Planned expenditure in hours
Open hours / Outstanding time	Still open hours - open effort
System (all fields) Creation date and time / Created date and time Created by / Created by Modification date and time / Modified date and time Changed by / Modified by	Specifying the date, time and staff creating

Information Register Procurement / Purchasing	Statement
Country of origin / Country of origin	Manufacturer country or country of origin of Delivery
vendor / Vendor	Vendor (from the vendor master), which provides the resources.
Delivery time / lead time	Time (in days) required for the replacement.
Cost Budget / Purchase costs budget Cost Realized / Purchase costs effective	self explanatory
Date of purchase / Acquisition date	self explanatory

Our property / our property Proportion of% / Share% Property Customer / Property of customer property / Property Leasing / leasing	Specifies the ownership of resources. In the field "property debtor", a customer will be selected from the customer master.
Internal / Internal Constructor / Construction engineer Internal / Internal Manufacturer Vendor / Manufacturer vendor Manufacturer / Make	You can store information on the designer and manufacturer. In the fields and constructor "Manufacturer Vendor" can be selected vendor from the vendor master.
Project Preparation / Project for manufacturing	Reference to Microsoft Dynamics 365 for operations projects that are created for production, maintenance and service.
Cost Budget / Purchase cost budget	
Cost Realized / Purchase cost effectiveness	
Project Maintenance / Service / Project for maintainance service	
Plant number / Fixed asset number	Optional - This is where the resources can be associated with the asset number of the asset accounting.

The screenshot shows the 'Tool' form in Microsoft Dynamics 365 Operations. The form is titled 'ST1 : Strapping Tool 01'. The 'STATUS' section shows 'Internal release status' as 'Stopped' and 'Release status external' as 'Restricted'. The 'PRODUCT DIMENSIONS' section includes fields for 'Weight for blank part' (0.00), 'Weight for sprue bush/spill' (0.00), and 'Weight' (0.00). The 'PRODUCT SPECIFICATION' section includes 'Mold set' (No) and 'Number of Cavities' (0). The 'ADMINISTRATION' section includes 'CAD drawings'. The 'ELECTRODES ADMINISTRATION' section includes 'Electrode set no.'. The form also has a 'Warehouse' field and a 'Condition' dropdown.

Information Register Technical / Technical information	Description
Release Status internal / Internal release status	Selection of the internal status for the operating means. The status selection can be predefined in the settings for resource management. Pro productions can define which release status to be checked.
Release status External / External release status	Selection of the external status of the resources. The status selection can be predefined in the settings for resource management. Pro productions can define which release status to be checked.
Sharing customer / Customer release	It can be selected from the customer master data of the customer who is responsible for the release.
Release Date / Firming date	Release Date (can optionally be used for internal or external release).
Check combinations / Check Combinations	Specification whether a test release Product Dimensions combination is to be performed for the resource
Unique / Unique	Only an active combination of product dimension combinations is permitted
set tool	Combination of disparate products from this tool.
number Weight per disc Weight sprue / overflow Weight, unit	Injection molding tools: There are formed sums of the number and weight of the blanks produced. "Weight per disc" is the average weight of the blanks.
Drawing CAD / CAD drawings Index / index CAM data / CAM Data Management Accessories / Administration of accessories	Multiline Text Field to free information to manage.
Electrode set no. / Electrode Set number Warehouse / Warehouse Bin / Location State / condition Electrodes Administrative / Electrodes administration	Injection molds: Information electrode administration. The state selection can be predefined in the settings for resource management.

Dynamics 365 Operations Tool administration > Common > Tool

USMF

TOOL

MAINTAIN: Edit, Copy tools

LINES: Component assignment

ACTIVITIES: Activities, Create activities, Automatic activities

STRUCTURES: Model structure, Product dimensions

VIEW: Postings, Usage, Assignment, History

ATTACHMENTS: Generate from template

ITEMS: Create item

TOOL: Create resource, Create resource group

TEST INSTRUMENT: Create test instrument

Click the edit button to make changes.

TOOL ST1 : Strapping Tool 01

Usage control

BASIC DATA

Usage active: Yes ☒

Cavity: 5

Guaranteed units: 9762

Guaranteed units per cavity: 1952

Technical increase +: 10000

Reason:

Technical reduction -: 5000

Reason:

EXTERNAL PRODUCTION

Tool is used external: No ☒

Vendor account: US-105

Customer account: US-001

POSTINGS

Last usage: 4/19/2017

PRODUCTION/PURCHASE

Initial good balance: 2000

Initial error balance: 2000

Postings good quantity: 10762

Postings error quantity: 0

Sum total: 14762

Balance good quantity: 2000

Balance total: 0

SHOT COUNT

Start balance shot count: 0

Shot count: 2338

Total: 2338

Information Register Performance assessment /Usage control	Description
Performance monitoring active / Usage active	Flag Yes - all bookings will be considered and recorded.
Cavity /cavity	Number of simultaneously resulting products per tool / Hub
Guaranteed units /Guaranteed units	The manufacturer guaranteed units
Guaranteed units proKavität /Guaranteed units per cavity	calculated field Guaranteed units per well = Guaranteed units / well
Increase technical +, base /Technical increase +, Reason	Technically unavoidable correction of guaranteed units
Reduction technology - basic /Technical increase -, Reason	Technically unavoidable correction of guaranteed units
Net units /Net units	calculated field Net units = Guaranteed units + increase - reduction
Resource is used externally, accounts payable /Tools is used external	Resources can be managed, if it is made a suppliers. The usage assessment then based on the quantities delivered to the associated orders.
Final use / Last usage	Date of last use of the resource (information)
Start balance Good /Initial good balance	Display of the current usage of the equipment. The sums resulting from the usage-related bookings during production and purchasing processes. Good amount - Is the equipment in a used condition can here already the starting balance to be set manually.
Start Balance Committee /Initial error balance	Committee Volume - Is the equipment in a used condition can here already the starting balance to be set manually.
Reservations Good /Postings good quantity	All Well-amounts from the journal entries (production orders, purchase orders, sales orders) are summed up here.

Bookings Committee / Postings error quantity	All committee sets out the journal entries (production orders, purchase orders) are summed up here.
Total sum / Sum total	The sum of all bookings will be displayed here.
Balance Yield / Balance good quantity	
Balance Total / balance total	
Start balance number of shots / Start balance shot count	
Number of shots / shot count	
Total / Total	
Resource is used externally / Tools is used external	Resources can be managed, if they are provided a supplier available, or at a customer in use. The usage assessment then based on the quantities delivered to the corresponding purchase orders or delivery to the customer. Tools Text indicated can only articles and therefore no operations are allocated. With receipt of goods or the delivery of the article, the quantity received is posted as a resource reservation.
Vendor account / Vendor account	Supplier, wherein the operating agent is used.
Customer account / Customer account	Customer in which the resource is used.

The screenshot shows the Dynamics 365 Operations interface for a 'Tool' record named 'ST1: Strapping Tool 01'. The 'Quality assurance' section is expanded, showing 'Activity groups' with 'QJM' and 'QREV' listed. The 'Subject to quality inspections' section shows 'Tool Test' and 'Concentrat' with a checkmark next to 'Tool Test'. The interface includes a top navigation bar with 'Dynamics 365' and 'Operations', and a left sidebar with various tool-related options.

Information Register Quality Assurance / Quality assurance	description
Activity Group / Activity groups	Group of activities for which a quality inspection order to be used.
Test Group / test group	Test specification for this equipment and this activity group
subject to quality inspection / Subject to quality inspections	Specifies whether necessarily a quality audit engagement must be used for activities of this group.

TOOL
ST1 : Strapping Tool 01

General | Purchasing | Technical information | Usage control | Quality assurance | Planning

+ Add | Remove

Tool Number	Priority	Active
ST1	0	<input checked="" type="checkbox"/>

Information register Planning / Planning	Description
Resource number / tool Number	Select here that resource which is used when the main resource is not available.
priority / Priority	Enter here the priority in the selection of the equipment on.
active / Active	Utilities Active Yes / No

2.1.1.1 Function buttons

MAINTAIN: Edit, Copy tools
LINES: Component assignment
ACTIVITIES: Activities, Create activities, Automatic activities
STRUCTURES: Model structure, Product dimensions
VIEW: Postings, Assignment, Usage, History
ATTACHMENTS: Generate from template
ITEMS: Create item
ITEMS: Create resource, Create resource group
TEST INSTRUMENT: Create test instrument

Function button	Description
To edit / Edit	An existing resources can be edited here.
Erase / Delete	Once booking Technically dependent object can be located in the system a resource can not be deleted (historical data).
resources Copy / Copy Tools	Position to be copied to a resource from which the data. All data is transferred 1: 1, additional can be selected whether the positions are to be copied and whether the usage data to be adjusted.
Equipment New / tool (New)	When creating a resource are a few mandatory fields to fill (resource number resource group release status Internal / External).
Positions	

assignment /assignment Component	If a resource flag "positions active" is set, corresponding resource locations can be assigned to this function.
Activities /Activities	<p>Here activities can be defined to resources. Activities are described in detail in chapter "Activity Management."</p> <p>Activities /Activities -> All activities for the selected resources are displayed and can be edited there also.</p> <p>Create Activities /Create activities -> Dialog for creating activities opens.</p> <p>Automatic Activities /automatic activities -> Dialog for creating automatic activity opens.</p>
Model Structure Tree / Model structure	Indicates that resources with its operational center positions in a tree view. Is the resource a model structure assigned, this can also be displayed. The model structure is described in the "outline" in detail.
Show /View	<p>Allows visits to the reservations made to the resource, as well as an overview of the assignment (to articles / operations) of the equipment and its use (in production orders).</p> <p>Reservations / postings -Here all bookings and journals to resources can be accessed.</p> <p>assignment / Assignment -assignment - Are> which production orders, products, and routings associated bookings.</p> <p>Use / Usage -Cross-reference-> Where the resource was used (production orders, activities, operations, cost centers, resources, product numbers). With the limitations that the order proposals are to be involved in the selection</p> <p>history / history -Resources History -> All bookings of manufacturing orders and activity bookings</p>
Attachments /attachments	Here documents, certificates, files and images can be stored for documentation.
To write an article /Create item	Here, the resource can be created as a product (call Create dialog items).
Create resource /Create resource	Here, the resource can be created as a resource (call dialog resource).
Creating resource group /Create Ressource group	Here, the resource can be created as a resource group (call dialog resource groups).
Create Test Instrument /Create test instrument	This feature allows a resource can be applied as a test instrument (call dialog Test Instruments).

2.1.2 Resources Positions / tool components

In addition to the main tool master a separate master data record is created for each tool component, which is similar to the overall tool general information, procurement information, technical information and usage control data includes. So parts of a tool such as slide, die, mold cavity and bending dies, etc. a total tool can be mapped.

The information and functionality between the resources and resource positions differ in some areas. An overview to them in the chapter "Integration overview resources and working capital positions"

➤ **Call: / Tool Administration> Common> Tool components**

Component number	Name	Index	Date	Category	Activities active	Usage active	Internal release status	Release status external	Last usage
4000-VD-01-01	Component 01	10	2/15/2017	CAT 1			Released	Released	
4000-VD-01-02	Component 02	10	2/15/2017	CAT 1			Released	Released	
4000-VD-02-01	Component 01	10	2/15/2017	CAT 1			Released	Released	
4000-VD-02-02	Component 02	10	2/15/2017	CAT 1			Released	Released	
TC001	Tool component 001	123	1/31/2017	CAT 1			Released	Released	
TC002	Tool Component 002			CAT 1			Released	Released	

By using the filter criteria in the upper part of the screen form the resources positions can be selected for the view that meet the specified criteria.

The button functions can be a convenient copy function are selected for working capital positions. It usage information is considered optional.

The button Probe enables the display of postings and the use of resources position.

Information resources positions / tool components	Statement
Activity due / Activities due	Indicates if an activity for resource position is due. The parameters, the behavior of the system are defined when due or overdue activities (example screen message).
Position number / Component number	Unique number of the resource position
Index / index	Possible indexation
date / Date	Signing Date position
Designation / Surname	Identification of resource position
Category (position) / Category	Categories are used to group, filter and sort of screen displays and printouts.
Activities active / Activies active	If the flag is set, activities can be associated with the resource position (button activity is active).
Performance active / Usage active	If the flag is set, the usage of the operating center position are calculated and recorded.
Release Status internal / Internal release status	Information about the current status of the resource position (eg released by QS is carried out)
Release status External / External release status	Information about the current status of the resource position (eg approval by the customer is carried out)
Final use / Last usage	Date of last use of the resource position.

The General tab, procurement, technical and usage monitoring contain identical information as the resource itself. Exceptions are the product specifications in the register Technically, which are maintained on operating midplane. Notes on the individual fields are located under Paragraph 2.1.1 it behaves with the function buttons as well.

2.1.3 Assignment of resources to resources positions /Assignment tool components to a tool

About the function position assignment on the equipment, the equipment items can be assigned to the appropriate resources. Again, a jump to the reservations is possible.

The screenshot shows the 'Component assignment' form in Dynamics 365. The form is titled 'T001-TEST TOOL 1 Component assignment'. It includes a left-hand pane with a filter and a list of tool components (TC001, TC002). The main area contains several sections: 'General' with fields for Tool Number (T001) and Component number (TC001); 'MISCELLANEOUS' with an 'Active' checkbox (checked) and an 'Index' field (123); 'IDENTIFICATION' with a 'Component number' field (TC001) and a 'NAME' field (Tool component 001); 'STATUS' with fields for 'Internal release status' (Released), 'Release status external' (Released), 'Customer release', and 'Firming date'; and another 'MISCELLANEOUS' section with 'Activities active' (No), 'Usage active' (No), and 'Cavity' (1).

Information resources position assignment	Statement
active / active	Indicates whether this association is active.
Position number / Component number Index / index date / Date Designation / Surname Category / Category	The information is taken from the master data of the resource positions (notes qv)

2.1.4 Model structure /Model structure

The model structure makes it possible to create a user-defined structure superior over the requisite resources. So-called models are defined.

- **Call: / Tool Administration> Setup> Model structure**

Model structure

Model number: MOT, Name: Mould tools

General

IDENTIFICATION

Model number: MOT, Name: Mould tools, Model structure: [empty]

Usage control

BASIC DATA		Technical reduction -	PRODUCTION		Postings
Guaranteed units	500000	1000	Initial balance	5000	0
Technical increase +	10000	Net units	Initial balance	1000	Balance good quantity
		509000			499000
			Postings	5000	Balance total
					498000

POSTINGS

Last usage: 2/15/2017

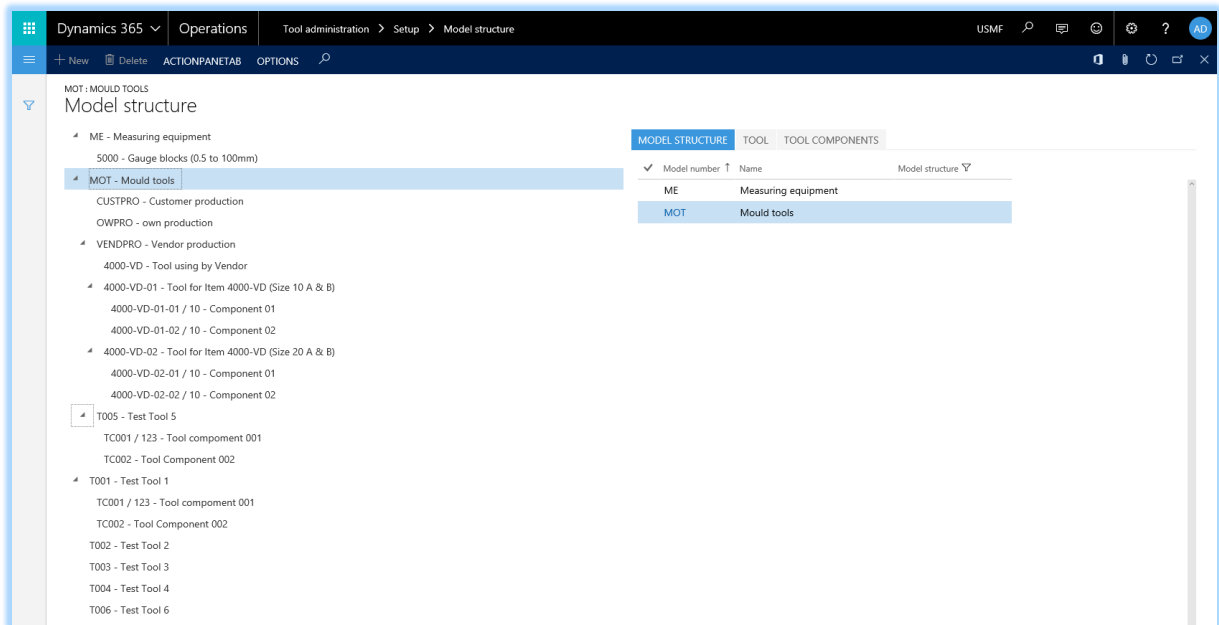
System

SYSTEM

Created date and time: 2/15/2017 10:32:54 AM, Created by: ava2, Modified date and time: 2/15/2017 10:32:54 AM, Modified by: ava2

Information model structure /Model structure	Description
Model Number /Model number	Unique number or name of the model
Designation /Surname	Identification of the model
Model structure /Model Structure	Here the parent model can be entered and thus a model structure are constructed.
Remaining fields (usage control data) / Usage controldata	The usage control data are no fields, they are calculated by the postings on the resources that are assigned at any stage in the model structure and represented in a compact in the hierarchy.

The button model structure tree, a structure may be called representation. Here, the model structure is displayed with the associated resources and the associated resource positions. It is also possible from this position further resources and / or equipment positions detected. Double-click on the resource or resource location can be jumped directly into the position window.

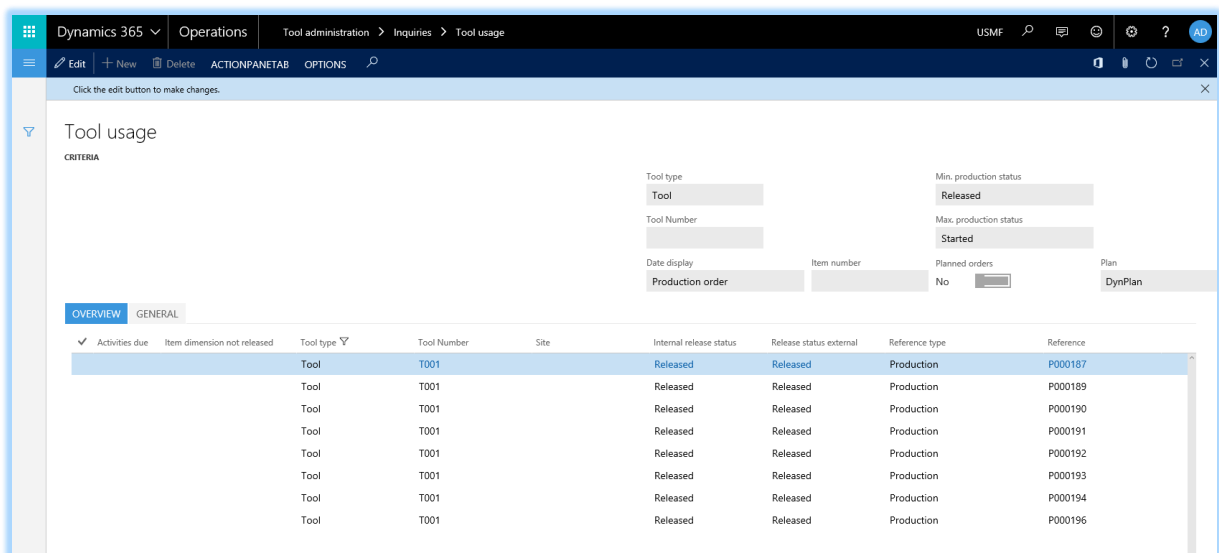


If a tool is structured into its individual components, as are usage control, reference and activity monitoring possible both on the overall tool as well as on the individual components.

2.1.5 Cross-reference /tool Usage

The reference shows the use of a resource or a resource position in manufacturing orders and production operations. Furthermore, automatically establishes a use according to productions on the production order.

➤ **Call: / Tool Administration> Inquiries> Tool usage**



Filter criteria /filter criteria	Statement
Equipment type / tool type	Choice of equipment and working capital position
Resource number / tool number	Selection to display only a resource number.
resource / resource	Displays only uses on a resource. By ticking the flag "lock" is active, this filter.
Item number / Item	Displays only uses for an item. By ticking the flag "lock" is active, this filter.
Min. Production Status / Min. Production status	Displays only uses in productions that have at least the specified production status
Max. Production status / Max production status	Displays only uses in productions that have at most the specified production status
Order proposals / Planned orders	By ticking this flag also uses in only planned productions are shown.
plan / plan	What master planning should be included in the selection

Information Use BM Register Overview	statement
activity / Activities	Indicates that an activity is associated
Reference Type / Reference type	Shows to which reference type is
reference / Order Reference	Shows the number of reference (here no. Of the production order) to
Amount / Quantity	Selection from the master data of the resource positions
Index / index Designation / Surname Category / Categorie Performance active / Usage control active Activities active / Activities active	Detailed information of the resource positions; these fields are displayed in the master data for information but can not be edited here.

Information Use BM General tab / general	Statement
Equipment type / tool type	Indicates whether this is a resource or a resource position
Resource number / tool number	Unique identifier of the resource / resources position
Reference Type / Order referenceType	self explanatory
reference / Reference	Shows the number of reference (here no. Of the production order) to
Activity due / Aktivitäten due	Indicates whether an activity is due
Open hours / Outstanding time	Shows the number of planned hours for the activity to
Product dimension not released / Item dimension not released	Article not released dimension
Description / Variant Index / index Colour / Color	Displays the product dimension, are produced for the intended
Item number / Item	Item number, referred to by the use
Operation / surgery	Number of operation, referred to by the use
Amount / Quantity	Scheduled production quantity

Function Button / Function button	Statement
Schedule Change / change plan	If planned productions should also be involved, the production program schedule can be defined here, from which the planned productions.
Update mask / Refresh	Build the mask based on the current information on new
Activities / activities	Allows the jump in the activity (s)
Article Dimensions / Item dimension	Controls which product dimensions to be displayed.

2.1.6 Bookings for equipment and working capital positions / Postings tools and tool components

The usage control enables monitoring of parts produced with the tool. The usage can be set for the total tool as well as for individual components (eg cavity).

The feedback of the usage comes directly from the Ready message production. The parameter can be set whether the usage control from the feedback of the parts produced, or from the time confirmation is read. If a complete production including tool manufactured externally, the usage control of the goods receipt in purchase is registered. If a production made by the customer himself again the message can be booked on a delivery to the usage control of the equipment. The corresponding resource is "in used external resources is" as and assigned to a service item. If this service shipped and booked the corresponding input delivery, this amount is recorded as an amount to the resource.

- **vendor /Vendor** -> The update of the amount of the usage control is performed in receiving to the delivery (Prerequisite -> Purchase Order)
- **customer /Customer** -> The update of the amount of the usage control is performed in the goods on the delivery note letters (Prerequisite -> Sales Order)

2.1.7 Detailed representation of the postings / postings detail

From the mask of the resource and the resource locations can bookings overview of resources bookings are called with the button query function.

➤ **Call: / Tool Administration> Inquiries> Postings**

✓ Date	Tool type ↑	Tool Number	Reference	Number	Good quantity	Error quantity	Cavity	Shot count
5/8/2017	Tool	Air Compressor 01	Sales order	000790	23	0	4	5
5/8/2017	Tool	Air Compressor 01	Purchase order	00000050	12	0		12
5/8/2017	Tool	Air Compressor 01	Purchase order	00000051	785	0	4	196
5/9/2017	Tool	Air Compressor 02	Production	P000187	23	0	5	4
5/10/2017	Tool	T1 Basic process	Production	P000188	90	10	10	10
5/10/2017	Tool	T1 Basic process	Production	P000191	100	0	10	10
5/11/2017	Tool	T1 Basic process	Production	P000194	100	50	10	15
5/11/2017	Tool	T1 item dimension pr	Production	P000195	100	0	10	10
5/10/2017	Tool	T2 external producti	Production	P000191	100	0	10	10
5/10/2017	Tool	T2 external producti	Sales order	000791	50	0	10	5
5/10/2017	Tool	T2 external producti	Purchase order	00000052	100	0	10	10
5/11/2017	Tool component	C1 Basic process	Production	P000194	100	50	10	15
5/11/2017	Tool component	C2 Basic Process	Production	P000194	100	50	10	15

✓ Date	Tool type ↑	Tool Number	Reference	Number	Good quantity	Error quantity	Cavity	Shot count
5/8/2017	Tool	Air Compressor 01	Sales order	000790	23	0	4	5
5/8/2017	Tool	Air Compressor 01	Purchase order	00000050	12	0		12
5/8/2017	Tool	Air Compressor 01	Purchase order	00000051	785	0	4	196
5/9/2017	Tool	Air Compressor 02	Production	P000187	23	0	5	4
5/10/2017	Tool	T1 Basic process	Production	P000188	90	10	10	10
5/10/2017	Tool	T1 Basic process	Production	P000191	100	0	10	10
5/11/2017	Tool	T1 Basic process	Production	P000194	100	50	10	15
5/11/2017	Tool	T1 item dimension pr	Production	P000195	100	0	10	10
5/10/2017	Tool	T2 external producti	Production	P000191	100	0	10	10
5/10/2017	Tool	T2 external producti	Sales order	000791	50	0	10	5
5/10/2017	Tool	T2 external producti	Purchase order	00000052	100	0	10	10
5/11/2017	Tool component	C1 Basic process	Production	P000194	100	50	10	15
5/11/2017	Tool component	C2 Basic Process	Production	P000194	100	50	10	15

Dynamics 365 Operations > Tool administration > Inquiries > Postings									
Postings									
VIEW									
View: <input type="radio"/> Postings <input checked="" type="radio"/> Totals									
Link views: Yes <input type="checkbox"/>									
OVERVIEW GENERAL									
✓ Date	Tool type ↑	Tool Number	Reference	Number	Good quantity	Error quantity	Shot count		
5/8/2017	Tool	Air Compressor 01	Production	000790	23	0	5		
5/8/2017	Tool	Air Compressor 01	Purchase order	00000050	12	0	12		
5/8/2017	Tool	Air Compressor 01	Purchase order	00000051	785	0	196		
5/9/2017	Tool	Air Compressor 02	Production	P000187	23	0	4		
5/10/2017	Tool	T1 Basic process	Production	P000188	90	10	10		
5/10/2017	Tool	T1 Basic process	Production	P000191	100	0	10		
5/11/2017	Tool	T1 Basic process	Production	P000194	100	50	15		
5/11/2017	Tool	T1 item dimension pr	Production	P000195	100	0	10		
5/10/2017	Tool	T2 external producti	Production	000791	50	0	5		
5/10/2017	Tool	T2 external producti	Production	P000191	100	0	10		
5/10/2017	Tool	T2 external producti	Purchase order	00000052	100	0	10		
5/11/2017	Tool component	C1 Basic process	Production	P000194	100	50	15		
5/11/2017	Tool component	C2 Basic Process	Production	P000194	100	50	15		

Information Bookings Overview tab	Statement
date /Date	Date of booking. the book is performed with the finished message from manufacturing orders or with the confirmation of the operations depending on the setting. For external manufacturing date of the booking may be the receipt date.
Resource number /tool number	Display the resource number
Equipment type /tool type	Indicates whether this is a resource or a resource position
reference /Reference	Indicates from which Microsoft Dynamics 365 for operations module resulting postings. The field is to be considered in conjunction with the numeric keypad.
Number /Order number	Displays the unique number of orders from production or purchase.
Yield /Good quantity	Resulting amount of the feedback on the corresponding order.
Committee Volume / Error quantity	Resulting amount of the feedback on the corresponding order.

<

The button book references you get an overview of the related transactions from the production or procurement processes in the Microsoft Dynamics 365 for operations standard modules.

Totals and evaluation of the bookings

On the usage control tab control of the resources they view an overview of the service provided by the equipment.

TOOL
ST1 : Strapping Tool 01

Usage control

BASIC DATA	EXTERNAL PRODUCTION	PRODUCTION/PURCHASE	SHOT COUNT
Usage active Yes <input type="checkbox"/>	Tool is used external No <input type="checkbox"/>	Initial good balance 2000	Start balance shot count 0
Cavity 5	Vendor account US-105	Initial error balance 2000	Shot count 2338
Guaranteed units 9762	Customer account US-001	Postings good quantity 10762	Total 2338
Guaranteed units per cavity 1952	POSTINGS Last usage 4/19/2017	Postings error quantity 0	
Technical increase + 10000		Sum total 14762	
Reason		Balance good quantity 2000	
		Balance total 0	
Technical reduction - 5000			
Reason			

Information resources, Register Performance assessment /Usage control	statement
Net units /Net units	Calculated Field /Caluculeted field Net units = Guaranteed units + increase - reduction Net Units = Guaranteed units per cavity + Technical Increases - Technical reduction
Start balance Good /Initial good balance Start Balance Committee /Initial error balance	It can be a starting balance are input, which enters into the calculation of the current balance with.
Reservations Good /Postings good quantity Bookings Committee /Postings error quantity	Sum of the usage-related bookings during production and purchase / sales processes

Balance Total / **balance total**

Display of the current usage of the equipment.

Balance Total = net units - Start balance - Bookings

Balance = Net total units - Sum total - Postings

2.2 Activity Management /Activity management

The activity management allows mapping of individual activities (eg, repair, maintenance) to a tool or tool component.

Is a tool associated with an activity, as indicated by symbols in the tool base? Activities can be monitored selectively in corresponding masks with filters. When you schedule production orders a resource position is for a resource / examined whether activities of the respective control equipment / resource position are due in the corresponding period.

The reporting behavior (abort or warning), as well as the time of notification (rough scheduling /**operation scheduling**, Detailed scheduling /**job scheduling**, ...), In the parameters of the resource management can be set (see chapter settings and parameters).

➤ **Call: Tool administration> Setup> Parameters (Notification)**

The screenshot shows a configuration window titled "TOOL - ACTIVITIES". It contains several settings, each with a label and a toggle switch:

- Cancel when notification**: No (toggle is off)
- Operations scheduling**: Yes (toggle is on)
- Job scheduling**: No (toggle is off)
- Release**: Yes (toggle is on)
- Start**: No (toggle is off)
- Firm planned order**: Yes (toggle is on)
- Cancel when notification (Firm order)**: No (toggle is off)

A tool or component can be assigned any number of activities. An activity can be controlled Date (eg maintenance from 7.1.2016 until 07.10.2016) or they may be dependent quantities. (Eg revision to 50000 pieces).

The activities can on the working capital /**tool** or resource position mask /**tool components** be called.

Activities due	Tool Number	Name	Mold set	Tool group	Positions active	Usage active	Activities active	Internal release status	Release status external	Last usage	Course out
✓	AC01	Air Compressor 01		AC Group	✓	✓	✓	Restricted	Released	4/12/2017	✓
	AC02	Air Compressor 02		AC Group	✓	✓	✓	Restricted	Released	4/12/2017	
	AC02-Copy	Air Compressor 02		AC Group	✓	✓	✓	Restricted	Released		
	AC03	Air Compressor 03		AC Group	✓	✓	✓	Released	Released		
	AC04	Air Compressor 04		AC Group	✓	✓	✓	Released	Released		
✓	AC05	Air Compressor 05		AC Group	✓	✓	✓	Released	Released		✓
	AC06	Air Compressor 06		AC Group	✓	✓	✓	Restricted	Released		
	AC07	Air Compressor 07		AC Group	✓	✓	✓	Restricted	Released		
	ASS01	Assembly tool (Rev 00/01)		ProdItem	✓	✓	✓	Released	Released	4/25/2017	
	C001	Tool by Customer		ProdItem	✓	✓	✓	Released	Released	4/6/2017	
	M0010	Gauge blocks		MM	✓		✓	Released	Released		✓
	M0100	Laser control measuring		MM	✓			Released	Released		
	MO002	Mould Pen Rev 00		ProdItem	✓	✓	✓	Released	Released		
	MO003	Mould Pen Rev 01		ProdItem	✓	✓	✓	Released	Released		
	NewTool	Raphael		MM	✓		✓	Released	Released		
	ST1	Strapping Tool 01		SS Group	✓	✓	✓	Stopped	Restricted	4/19/2017	
	ST10	Strapping Tool 10		SS Group	✓	✓	✓	Released	Released		
	ST11	Strapping Tool 11		SS Group	✓	✓	✓	Stopped	Restricted		

The view shows the activities for the selected resources / **tool** or resource positions /**tool components**,

USMF	Status	Start date	End date	Amount	Effective quantity	Quantity when creating	Amount at settlement	Activity group
USMF-000137	In progress	4/17/2017	4/17/2017	35	5223	5223	ToolMain	Tool Standard Maintenance
USMF-000180	Created	5/8/2017	5/8/2017		5223	5223	QJM	Quality inspection measurement

Information activities	Statement
due /Activities due	Icons indicate the due date of an activity to
Activity number /Activity number	Unique identifier of each activity
status /status	With the functions button the status displayed here can be changed. Possible characteristics are: created, in work and done.
Start date, end date /End date	Date fields, mark the start and end of the activity. If the start date is reached, an icon appears in the box Overdue.
Amount /Quantity Current amount /Effective quantity	If the field current amount reaches the value of the field size, the field is Overdue assigned a symbol also. Depending on the parameter settings, the use of resources or the resource position is affected.
Quantity when creating /Creation quantity	Showing the amount of which the activity was created
Amount at settlement /completion quantity	Shows the amount of the activity was done in
activity /activity group	Activities can be created as master data that you assign here.

Description / description	Descriptions of activities are taken automatically from the master data.
Planned hours / Scheduled time	Planned duration of the activity
Open hours / Outstanding time	Reported Duration of Activity
Test Group / test group	Test specification for this activity. Required for installation of quality testing contracts.

There is also the possibility of a change in status of the activity.

The following statuses are possible:

2.2.1 Manually Creating Activities /Manual creation of activities

Activities can be created manually for individual resource and / or resource positions are described from inputs or operating center position as described under 2.2.

2.2.2 Mass production of activities /Bulk creation of activities

An activity can be created via a ground preparation for a variety of resources:

➤ **Call: Tool administration> Periodic> Create activities**

This function also periodic activities can be displayed (for example: all 100 units Check or time-dependent posting date or when ended the activity or has been started).

In Field Activity /**Activity groups** the activity group /**Activities** are given, for the activities to be created. About the "Select" button, the selection will be made, for which resources and / or equipment positions the appropriate activity to be created.

2.2.3 Using automatic Activities /Use automatic activities

Activities can be automatically generated based on production ready messages or operation confirmations. If the production order or the operation is "finished", the activity is triggered. Prerequisite for the use of automatic activities that enable the appropriate flags in the parameters of the resource.

Activity templates

Template number: 01

General

GROUPING
Activity groups: Activity 1

TIME-DEPENDENT
☒ **TIME-DEPENDENT**
 Difference start date: 5 Time unit: Day
 Duration: 1

QUANTITY-DEPENDENT
☒ **QUANTITY-DEPENDENT**
 Difference quantity: 1000
 Quantity-dependent: Yes

TIME EXPENSE
 Scheduled time: 200.00

CREATION
 Frequency: 1

Description
 DESCRIPTION
 Description: Activity A for initial process

Forecasting
 SCHEDULE
 Create planned order: Yes

Here is a template on the template number selected and added to the drawing type can be either of pedometers or an interval. These are defined in each of the next fields. Finally, the activity must be activated.

2.2.4 Quality testing contracts for activities /Quality order for activities

Condition - in the parameters of Inventory management, quality management is activated.

For an activity, a quality order can be generated. For this purpose, a test group must be specified. At level resources can per activity group a test specification (test group) are defined, which is then copied to the activity.

It is possible to create several quality audit assignments for an activity, but only one may simultaneously be open.

If an activity is specified as subject to quality inspection, then it is imperative to create and complete a quality audit contract before the activity can be done.

On the quality of audit engagements can be accessed through the activity, on the resources and via the main menu.

General

ACTIVITIES = AC01 : AIR COMPRESSOR 01
AC01 : Created

IDENTIFICATION

Activity number
USMF-000180

ACTIVITIES

Activity groups
QIM

Status
Created

Template number

Next activity created
No

DUE DATE

Start date
5/8/2017

End date
5/8/2017

DESCRIPTION

Description
Quality inspection measurement

TIME EXPENSE

Scheduled time

Outstanding time

Actual effort

COMPLETION

Date

Worker

QUANTITY

Quantity

Completion quantity

Creation quantity
5223

Quality assurance

TEST SPECIFICATION

Test group
Tool Test

Subject to quality inspections
Yes

QUALITY ORDER

Status

2.3 Performance assessment /Usage control

The transaction / usage balances recalculation makes it possible to monitor the quantities produced with a resource or a resource position. The respective amounts are calculated automatically at the ready message of the production orders or the operations (adjusted) and updated in the resource management.

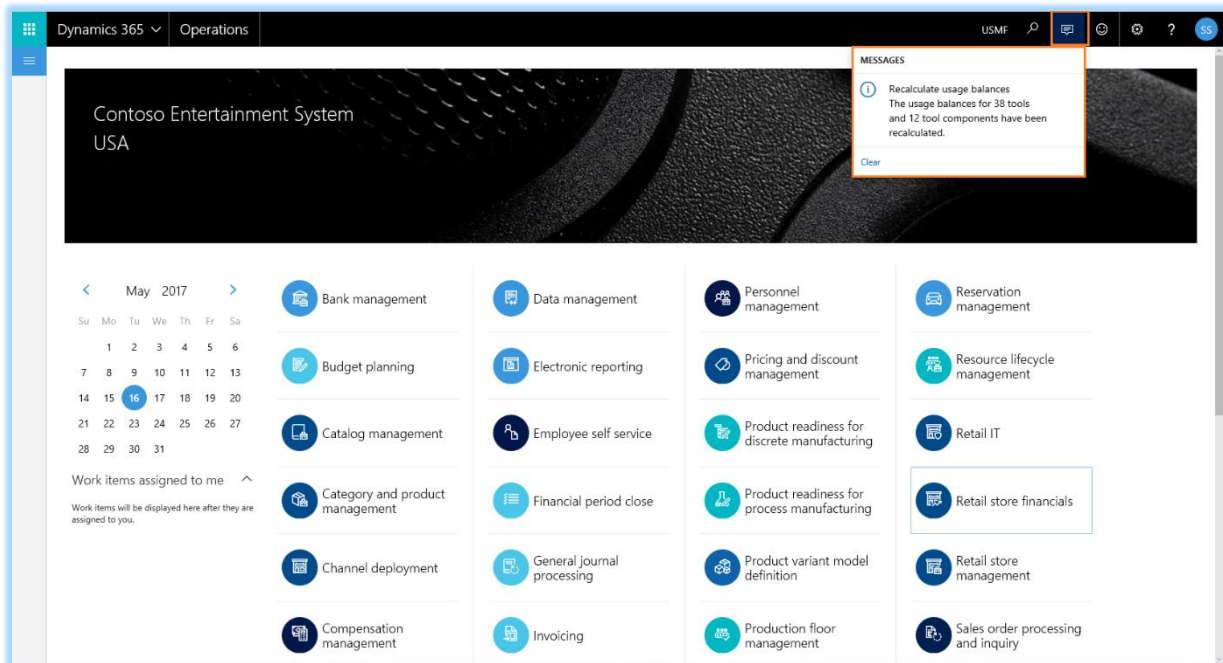
Recalculate usage balances

Parameters

Recalculate the usage balances for all tools?

OK Cancel

After executing get his feedback on the evaluated quantity structure.



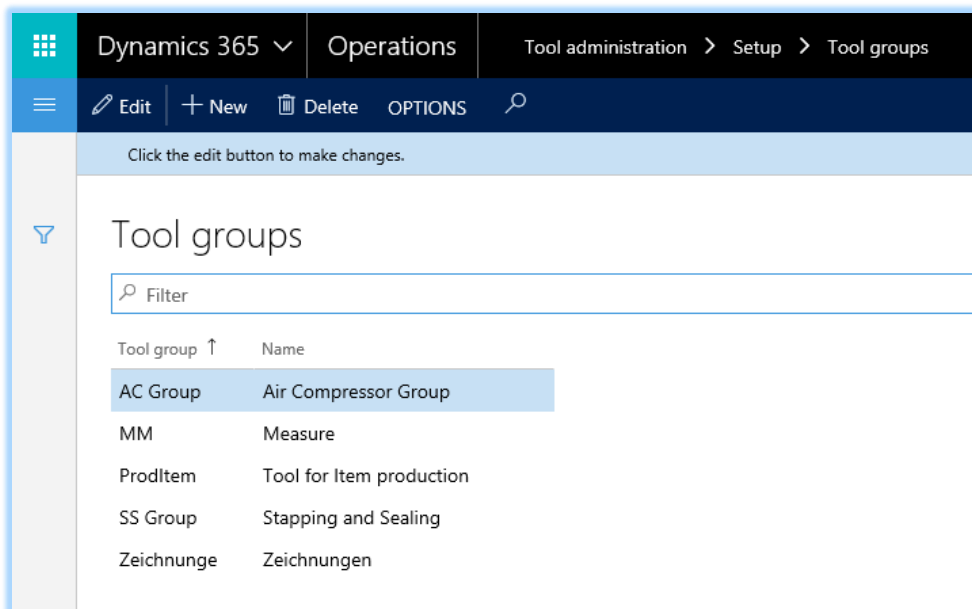
2.4 Settings and parameters /Setup and Parameter

All settings and parameters for resource management are located in the module resource management / settings

2.4.1 Investment of new resources groups /Create new tool groups

The resource group on the equipment is a mandatory entry.

➤ **Call: / Tool administration> Setup> Tool groups**



2.4.2 Plant new position Categories /Create new component categories

The position categories at the position is a mandatory entry.

➤ **Call: / Tool administration> Setup> Component categories**

Dynamics 365 > Operations > Tool administration > Setup > Component categories

Click the edit button to make changes.

Component categories

Filter

Category ↑	Name
Air Drier	Air Drier
ASSParts	Assembly parts
Sealer	Sealer
Switch	Switch

2.4.3 System of new model structures /Create new model structure

Model structures used to define a specific structure (sorting and summary level) set. In the usage control data from the feedback on the structures are cumulative.

➤ **Call: / Tool administration> Setup> Model structure**

Dynamics 365 > Operations > Tool administration > Setup > Model structure

Click the edit button to make changes.

Model structure

Model number: CUSTPRO Name: Customer production

General

IDENTIFICATION MODEL

Model number: CUSTPRO Name: Customer production

Model structure: MOT

Usage control

BASIC DATA

Guaranteed units: 0

Technical increase: 0

Technical reduction: 0

Net units: 0

PRODUCTION

Initial balance: 0

Initial balance: 0

Postings: 0

Balance good quantity: 0

Balance total: 0

POSTINGS

Last usage: 0

System

SYSTEM

Created date and time: 2/15/2017 11:07:09 AM

Created by: ava2

Modified date and time: 2/15/2017 11:07:09 AM

Modified by: ava2

2.4.4 Conditioning of new activity groups /Create new activity Groups

The activities can be grouped to provide a better overview or to the possibility of filtering and selection. The definition of the groups is made in the settings.

➤ **Call: / Tool administration> Setup> Activity groups**

Dynamics 365

Operations

Tool administration > Setup > Activity groups

Edit

+ New

Delete

OPTIONS

Click the edit button to make changes.

Activity groups

Filter

Activity groups ↑ Name

ItemCont	Production Item Control
QIM	Quality inspection measurement
QREV	Item parts quality review
SS Quality	Strapping and Sealing Quality C...
ToolClean	Tool cleaning
ToolMain	Tool Standard Maintainance
ToolReord	Tool reordering
ToolRev	Tool review

2.4.5 Conditioning of new release status /Create release status

For the life cycle of the equipment diverse status can be freely defined. Pro status can be set as to what one should behave with respect to the use in the production.

Call: / Tool administration> Setup> Status of release

Dynamics 365

Operations

Tool administration > Setup > Status of release

Edit

+ New

Delete

OPTIONS

Click the edit button to make changes.

Status of release

Filter

Status ↑	Name	Status for production
Released	Released	Released
Restricted	Restricted	Restricted
Stopped	Stopped	Stopped
Verified	Verified	Released

2.4.6 Creation and maintenance of activity templates /Create and maintain activity templates

➤ **Call: / Tool administration> Setup> Activity templates**

Activity templates

Template number: 1000

General

GROUPING

Activity groups: QM-MEA

TIME-DEPENDENT (checked)

Difference start date: 1, Time unit: Month

Duration: 2

QUANTITY-DEPENDENT (unchecked)

Difference quantity: 0

Quantity-dependent: No

TIME EXPENSE

Scheduled time: 16.00

CREATION

Frequency: 12

Description

DESCRIPTION

Description: Quality management recurring measurement test

Forecasting

SCHEDULE

Create planned order: No

2.4.7 Resource parameters / Tool administration parameters

The menu item parameter allows global settings resource management. The General tab and messages have influence on the functional use of the processes.

➤ **Call: / Tool administration> Setup> Parameters**

Register General /general

Tool administration parameters

General

Set up requirements for the tool administration module

Tool assignment

Route: Yes

Item/production order: Yes

Tool - Usage control

Type of posting for route: Route card posting

Change cavity: No

Initial value

Weight unit for tools: kg

Weight unit for product: g

Positions active: Yes

Usage active: Yes

Activities active: Yes

Main tool

Group of main tools: TG1

Tool - Activities

Automatic creation of activities: Yes

Copy function

Confirm copy of: 2

The screenshot shows the 'Tool administration parameters' page in Dynamics 365 Operations. The page is divided into a sidebar and a main content area. The sidebar contains links for 'General', 'Notification', 'Quality assurance', and 'Number sequences'. The main content area is titled 'Set up requirements for the tool administration module' and contains several expandable sections. Each section has a 'Yes' button and a 'Unit' dropdown menu. The sections are: 'Tool assignment', 'Tool - Usage control', 'Initial value', 'Main tool', 'Tool - Activities', 'Copy function', 'Asset accounting', 'Items', 'Resource', and 'Test instruments'.

Information Register General /general	Description
Work schedule /route	Allows the use and allocation of resources in the work plan (operation).
Product / Production Head / Item / production order	Allows the use and allocation of resources on products and at the head of the production order.
Booking for Work Plan / Type of posting for route	Determines when the use of the resource is posted. Possible settings are ready message or operation message.
Change cavity / Change cavity	Here you can set whether in production planning and production order creation, the cavity of the tool can be changed.
Weight unit operating middleweight unit product / Weight units for tools / Weight units for product	Weight unit, in which the equipment and the product is maintained from production or purchase (Initial values can be overridden in resources)
Positions active / active position Performance active / Usage active Activities active / Activities active	Initial values for the resources can be overwritten as
Group the main resource / Group of main tools	Here sections for the principal resources can be applied
automatically create activities / Automatical creation of activities	Basically, setting whether automatic activities are at all possible.
Confirmation for copying / Confirm copy of	Maximum number of records in input Copy (security question)
Asset Accounting /	

Choose asset number	Button is active - it is possible to associate with a resource with an installation number
Items / create Item	Button is active - can an article be created from the resource management out.
resource /create resource	Button is active - from the resource management out, a resource or resource group to be created.
Test instrument /create test instrument	Button is active - from the resource management out a test instrument are applied. Similarly, the default unit.

Register messages /Notification

In the Register messages can be defined to which events (termination, release, start) and in which state (release status, availability, activities) messages are issued. If the "Cancel with message" field is set, the program does not allow for further use of the equipment until the reported problem (eg resource unavailable) is resolved. The entry in the field "from production status" can be defined, from which production status of production orders should be included in the availability check.

The screenshot shows the 'Tool administration parameters' window in Dynamics 365, specifically the 'Notification' tab. The window is titled 'Dynamics 365 > Operations > Tool administration > Setup > Parameters'. The left sidebar shows 'General', 'Notification', 'Quality assurance', and 'Number sequences'. The main area is titled 'Set up which notifications shall be generated'. It contains several sections: 'STATUS OF RELEASE', 'DELAYS', 'TOOL - ACTIVITIES', and 'TOOL - ACTIVITIES'. The 'From production status' dropdown menu is open, showing options: 'Released', 'Scheduled', 'Released', and 'Started'. The 'Released' option is selected.

Register Quality Inspection orders /quality assurance

The screenshot shows the 'Tool administration parameters' window in Dynamics 365, specifically the 'Quality assurance' tab. The window is titled 'Dynamics 365 > Operations > Tool administration > Setup > Parameters'. The left sidebar shows 'General', 'Notification', 'Quality assurance', and 'Number sequences'. The main area is titled 'Default values for quality orders'. It contains several sections: 'Service item for quality orders', 'Tool status management', 'Update release status internally', 'Update release status externally', 'Status at successful qualityorder', and 'Status at not successful qualityorder'. The 'Service item for quality orders' dropdown menu is open, showing options: 'D0012', 'D0013', 'D0014', 'D0015', 'D0016', 'D0017', 'D0018', 'D0019', 'D0020', 'D0021', 'D0022', 'D0023', 'D0024', 'D0025', 'D0026', 'D0027', 'D0028', 'D0029', 'D0030', 'D0031', 'D0032', 'D0033', 'D0034', 'D0035', 'D0036', 'D0037', 'D0038', 'D0039', 'D0040', 'D0041', 'D0042', 'D0043', 'D0044', 'D0045', 'D0046', 'D0047', 'D0048', 'D0049', 'D0050', 'D0051', 'D0052', 'D0053', 'D0054', 'D0055', 'D0056', 'D0057', 'D0058', 'D0059', 'D0060', 'D0061', 'D0062', 'D0063', 'D0064', 'D0065', 'D0066', 'D0067', 'D0068', 'D0069', 'D0070', 'D0071', 'D0072', 'D0073', 'D0074', 'D0075', 'D0076', 'D0077', 'D0078', 'D0079', 'D0080', 'D0081', 'D0082', 'D0083', 'D0084', 'D0085', 'D0086', 'D0087', 'D0088', 'D0089', 'D0090', 'D0091', 'D0092', 'D0093', 'D0094', 'D0095', 'D0096', 'D0097', 'D0098', 'D0099', 'D0100'. The 'D0012' option is selected.

Information Register Quality Assurance / quality assurance	Statement
Dummy products for quality testing contracts / Dummy item for quality orders	Shall be used for activities quality inspection jobs, so a dummy service item is to be defined. This is needed since for quality testing contracts the item number is defined as a mandatory field.
Release status internally To update / Update release status internally	Activated -> sets the approval status upon successful completion of the quality audit engagement.
Release status externally To update / Update release status externally	Activated -> sets the approval status upon successful completion of the quality audit engagement.
Status upon successful Quality audit engagement / Status at successful quality order	will set the status to successful completion of a quality audit engagement.
Status in unsuccessful Quality audit engagement / Status at not successful quality order	Status is set by not successfully completing a quality audit engagement.

Register Number Ranges / **Number sequences**

Here the number ranges which are required in the resource management applied.

Dynamics 365 ▾ **Operations** Tool administration > Setup > Parameters

Save OPTIONS 🔍

Tool administration parameters

General

Notification

Quality assurance

Number sequences

Set up number sequences for production tool management

Reference	Number sequence code
Tool Number	
Component number	▾
Activity number	TM_AC_001
Template number	

2.5 Reports of Resource Management /Reports Tool Administration

Below we look at five standard reports that are provided with the resources management.

Dynamics 365 Operations USMF

Tool

Go to Find Zoom Export

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5/11/2017
12:20 PM

Contoso Entertainment System USA

Tool Id	Tool Name	Tool Group Id	Comp Active	Activity Control	Use Control	Release Status
AC01	Air Compressor 01	AC Group	Yes	Yes	Yes	Restricted
ST1	Strapping Tool 01	SS Group	Yes	Yes	Yes	Stopped
ST11	Strapping Tool 11	SS Group	Yes	Yes	Yes	Stopped
ST2	ST 2	SS Group	Yes	Yes	Yes	Released
ST7	Strapping Tool 07	SS Group	Yes	Yes	Yes	Released

Dynamics 365 Operations USMF

Tool components

Go to Find Zoom Export

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11:54 AM

Contoso Entertainment System USA

Component number	Index	Date	Name	Category	Activities active	Usage active	Internal release status
Air Drier 01	01	3/9/2017	Air Drier	Air Drier	No	No	Released
ASS01-02	01	3/14/2017	Assembly Part 02	ASSParts	Yes	Yes	Released
Pressure Switch 1	01	3/9/2017	Pressure Switch	Switch	No	No	Released
Pressure Switch 2		3/21/2017	Pressure Switch 2	Switch	Yes	Yes	Released
V001-02	01	3/14/2017	Vendor component part 2	ASSParts	Yes	Yes	Released

Dynamics 365 Operations USMF

Tool usage

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Contoso Entertainment System USA

Tool Number	Name
ST1	Strapping Tool 01

Operation	Route code	Route relation	Item code	Item relation
Assembly	Route	000103	Table	PTM Item dimension
Wiring	Route	000005	Table	PTM Test 01

Production	Oper. No.	Priority
P000217	10	Primary
P000221	10	Primary
P000222	10	Primary
P000224	10	Primary
P000225	10	Primary
P000226	10	Primary
P000227	10	Primary
P000228	10	Primary
P000230	10	Primary
P000233		
P000233	10	Primary
P000234		
P000235		
P000236		
P000236	10	Primary
P000239	10	Primary
P000240	10	Primary
P000241	10	Primary
P000253	10	Primary
P000256	10	Primary
P000259	10	Primary
P000263	10	Primary
P000265		
P000267		
P000269		

Activities

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Tool activities
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Tool type	Tool Number	Activity number	Status	Start date	End date	Quantity	Postings	Activity groups	Description	Due	Scheduled time	Outstanding time
Tool	AC01	USMF-000180	Created	5/6/2017	5/6/2017		5223 QIM		Quality inspection measurement	1		
Tool	5F1	USMF-000137	In progress	4/17/2017	4/17/2017	35	5223 ToolMain		Tool Standard Maintenance	1	9:00	9:00
Tool type	Tool Number	Activity number	Status	Start date	End date	Quantity	Postings	Activity groups	Description	Due	Scheduled time	Outstanding time
Tool	5T1	USMF-000148	Finished	4/20/2017	4/20/2017		14762			0		
Tool type	Tool Number	Activity number	Status	Start date	End date	Quantity	Postings	Activity groups	Description	Due	Scheduled time	Outstanding time
Tool	5T7	USMF-000166	Created	4/20/2017	4/22/2017		1231 ToolClean			1	10:00	10:00
Tool		USMF-000167	Created	5/20/2017	5/22/2017		1231 ToolClean			0	10:00	10:00

Tools master data sheet

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Tools master data sheet
Contoso Entertainment System USA

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Tool Number	AC01	Property	AC Group
Tool			
Name	Air Compressor 01	Our property	No
Serial number		Share %	0.00
Old tool number		Property of customer	
Manufacturer vendor		Property	
Tool group	AC Group	Leasing	No
Inventory management		Make	
Warehouse	11	Internal	No
Location - 1		Manufacturer vendor	
Overall weight	25.00	Make	
Unit	kg		
Purchasing		Administration	
Country of origin		CAD drawings	AC-001
Agent	1001		
Lead time	0		
Purchase costs effective	105.00		
Acquisition date			

2.6 WorkSpace for Production tool management / Tool administration

Avanade Production tool management asset workspace provides the 360° cockpit view of the underlying business functionalities throughout Dynamics 365 for Finance & Operations business application from the areas of production module, accounts payable and accounts receivables.

Production Tool Management							Links	
Quantity	Postings	Activity groups	Scheduled ti...	Outstanding time	Actual effort	Test group	Reports	
1	15	Repair G	10.00	10.00		Tool TG	Tool	
1	15	Repair G	5.00	5.00	6.00	Tool TG	Tool components	
1	0	Maintenanc	15.00	15.00			Tool usage	
1	15	Repair G					Activities	
1	15	Repair G	2.00	2.00		Tool TG	Tools master data sheet	
1	15	Repair G	5.00	5.00		Tool TG		
1	15	Repair G	5.00	5.00	5.00	Tool TG	Periodic	
1	15	Repair G	10.00	10.00		Tool TG	Activities	
1	15	Repair G				Tool TG	Create activities	
1	10030	Automatic	1.00	1.00			Recalculate usage balances	
31	10030	Automatic	1.00	1.00			Copy assignment to product	
61	10030	Automatic	1.00	1.00			Copy assignment to production	
91	10030	Automatic	1.00	1.00			Setups	
121	10030	Automatic	1.00	1.00			Automatic activities	
151	10030	Automatic	1.00	1.00			Tool groups	
181	10030	Automatic	1.00	1.00			Component categories	
211	10030	Automatic	1.00	1.00			Model structure	
241	10030	Automatic	1.00	1.00			Activity groups	
271	10030	Automatic	1.00	1.00			Status of release	
1	0	Repair G					Type of production	
							Activity templates	

2.7 Integration overview resources and resource positions /Integration overview tools and tools components

The resource and the resource positions are similarly constructed in the basic structure, however, in terms of information and integration with other 365 for operations modules it is different. The following matrix is therefore an overview of which were that main functionality present in this module.

Function (Alphabetical Order)	resources Tools	Resource position / Tools components
Function Button /Function		
Resources Copy / Copy Tools	Yes / Yes	Yes / Yes
activities		
➤ Activities Overview / Activities overview		
➤ Create Activities / Create new activities	Yes / Yes	Yes / Yes
➤ Automatic Activities / Automatic activities		
Model tree	Yes / Yes	No / No

Show		
<ul style="list-style-type: none"> ➤ Reservations /postings ➤ Mapping resources /Assignment Tools ➤ Using resources /Usage Tools ➤ Equipment History /Tools history 	Yes / Yes	Yes / Yes
To write an article / Create new item	Yes / Yes	Yes / Yes
Create resource / Create new resource	Yes / Yes	Yes / Yes
Creating resource group / Create new resource group	Yes / Yes	Yes / Yes
Create Test Instrument / Create new test instrument	Yes / Yes	Yes / Yes
Register		
General / general	Yes / Yes	Yes / Yes
procurement <ul style="list-style-type: none"> ➤ Manufacturer /Vendor ➤ Reference project /project for manufacturing ➤ Reference Maintenance /project for maintainance ➤ Plant number /Link to fixed asset 	Yes / Yes	Yes / Yes
register Technically <ul style="list-style-type: none"> ➤ Release status Internal /Internal release status ➤ Release status External /External release status ➤ Drawing Management /Administration CAD to CAM ➤ Electrodes Administrative /Electrodes administration ➤ Product dimensions /Product dimension ➤ Product Specifications /Product specification drawings	Yes / Yes Yes / Yes Yes / Yes Yes / Yes Yes / Yes Yes / Yes	Yes / Yes Yes / Yes Yes / Yes Yes / Yes No / No No / No
Register Performance assessment / Usage control <ul style="list-style-type: none"> ➤ Performance assessment /Usage control ➤ External production (vendor, customer) /External production (Vendor, Customer) 	Yes / Yes Yes / Yes	Yes / Yes No / No
Register Quality Assurance / Qualitiy assurance	Yes / Yes	No / No
Register Planning / Planning	Yes / Yes	No / No

3 Installation

3.1 Requirements /Prerequisites

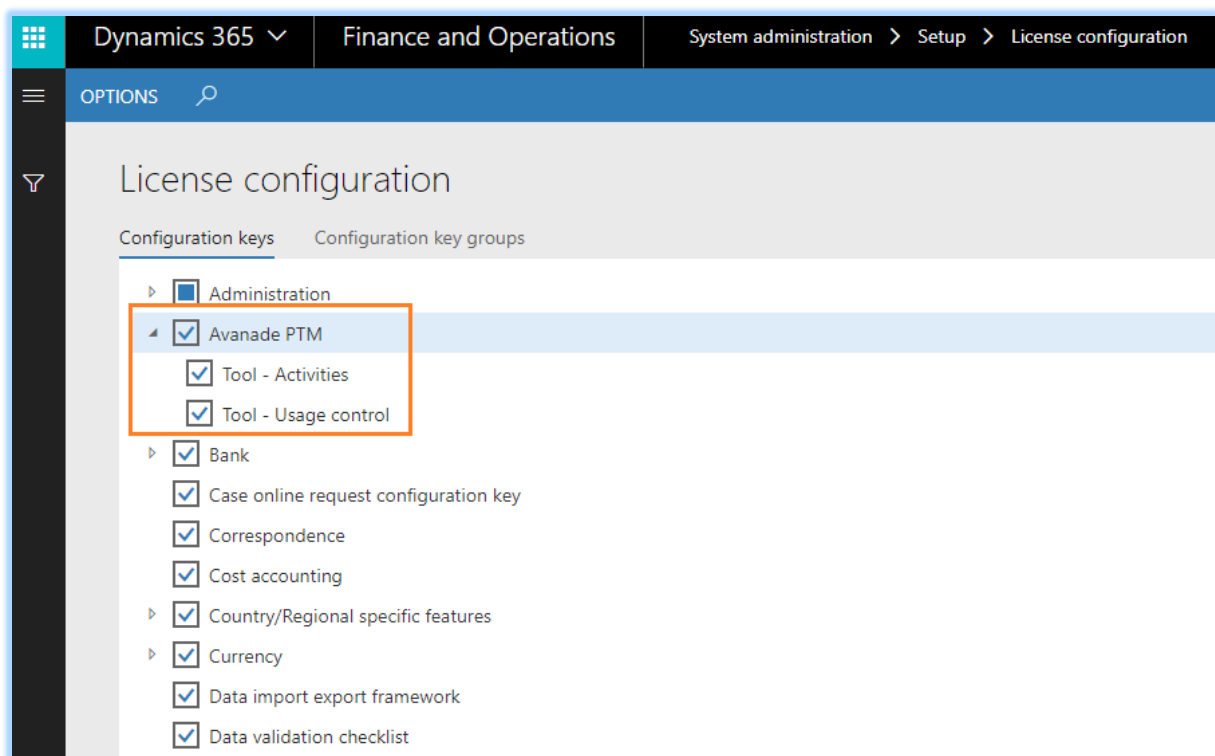
There are provided a current version of the AX2012, R2, R3 and Dynamics 365 for operations for following Microsoft Dynamics AX module licenses:

- Trading
- Production I
- Production II

3.2 configuration /system configuration

Model file and License file must be installed for accessing this asset and its functionalities.

➤ **Call: / System Administration > setup > License configuration**



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